

**Access to Microfinance & Improved Implementation of Policy Reform
(AMIR Program)**

Funded By U.S. Agency for International Development

Business Associations Strategic Planning

**Strategic Plan
for the
Association of Certified Financial Professionals**

DRAFT REPORT

**Deliverable for BAI Component
Task 2.7.2 Strategic Planning TA
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Preface

This Business Association Strategic Plan was prepared by association consultant Robert L. Ash for Chemonics International, Inc. and Bonnie Goldsborough, Fulbright Fellow attached to the AMIR Program Capital Markets component. The report was completed only with the cooperation and coordination of Dr. Zaki Ayoubi; the BAI Component Leader for the AMIR Program.

The structure and content reflected within this document has been specifically designed for the ACFP. The author, in addition to drawing on his own extensive international experience in enterprise development, utilized some aspects of *Developing a Program of Work, An Overview for Chambers of Commerce*, a publication of the Office of Chamber of Commerce Relations in the U.S. Chamber of Commerce, 1991 and CIPE's training module, *Strategic Planning and Programs of Work (SPP)*, 1995, in development of this report.

Special appreciation is extended to the Association of Certified Financial Professionals, in particular the organization's Chairman of the Board - H.E. Dr. Mohamed Said Nabulsi and fellow Board Members. Without their support and active participation, this strategic plan could not have been completed.

This report was prepared by Chemonics International, Inc., Prime Contractor to U.S. Agency for International Development for the AMIR Program in Jordan.

Abbreviations and Terminology

AB	Association of Brokerages
ACFP	Association of Certified Financial Professionals
AGM	Annual General Meeting of Members
AMIR	Access to Microfinance & Improved Implementation of Policy Reform
BA	Business Association
BAI	Business Associations Initiative
CHEMONICS	Chemonics International, Inc. (Washington, D.C.)
PoW	Program of Work
SGM	Special (or extraordinary) General Meeting of Members
USAID	United States Agency for International Development

Table of Contents

Preface	ii
Abbreviations	iii
Table of Contents	iv
 <i>PRE-PLANNING ACTIVITIES</i>	 1
 Background Review	 2
Preliminary report of Findings	3
Strategic Planning Report	6
 <i>PLAN DEVELOPMENT</i>	 11
MISSION STATEMENT	12
OBJECTIVES	13
Interactive Summary	14
The Strategy - A Three Year Plan	17
Programs of Work (2001 - 2004)	20
Implementation Schedule (2001 - 2004)	54
Program Objectives and Checkpoints (2001 - 2004)	57

PRE-PLANNING ACTIVITIES

Background Review

Due to the increasing globalization of the financial industry worldwide and the introduction of the Jordan Securities Law of 1997, the Jordanian financial sector has been undergoing massive changes in the past few years.

The separation of the Amman Financial Market into three independent institutions: Jordan Securities Commission, Amman Stock Exchange, and the Securities Depository Center, has caused tremendous changes in the way financial professionals are doing business in Jordan. Corollary changes have resulted with the introduction of electronic trading for brokers, the transfer of the country's only trading floor to a new computer-based location, and the increasing use of mutual funds and other sophisticated financial instruments as tools for investment.

In order for the Jordan financial sector to enjoy the benefits of these new investment tools, it is imperative that financial professionals, as individuals, understand this new environment. Never has it been so critical that financial professionals of Jordan educate themselves on the changes in this dynamic industry.

Understanding this need, the Securities Law of 1997 provided for the creation of the Association of Certified Financial Professionals (ACFP), to represent the financial professionals of Jordan. The Law required that the former financial industry association - the Association of Brokerages - be dissolved and recreated as an association representing individuals rather than institutions.

The ACFP was officially established on December 15, 1999 as a non-profit organization dedicated to representing the certified financial professional in Jordan and educating the public about the financial industry.

The ACFP was created to cater to specific need of the financial professional. Since establishment, the association recruited 117 active members.

The association's 7-member Board of Directors meets regularly to formulate and approve policy as well as develop programs of work specifically targeted towards responding to the needs of ACFP members.

Preliminary Report of Findings

Note: The AMIR Program Team developed and is distributing the following “Food for Thought” memo for use by the participants in the ACFP strategic planning session. These potentially actionable items are typical of those developed during a diagnostic study, in member surveys and in face-to-face meetings with Board members and staff. They are not nor are they intended to be comprehensive in nature. These notes are simply to be utilized as memory joggers and dialogue stimulators.

Food for Thought

The AMIR Project Team would like to bring to the attention of the Chairman and the Board of Directors of the Association of Certified Financial Professionals (ACFP), typical **Findings** which have been identified as potential **Action Items** for consideration by the ACFP during the Strategic Planning process which commences this week.

Organizational Recommendations For the Association of Certified Financial Professionals

Recommendation One: The ACFP has objectives that have been mandated by the Securities Law and Government however the organization has no Mission Statement. The Board of Directors needs to develop a Mission Statement that will guide the organization’s actions in future years. This Mission Statement needs to be widely communicated in all contacts with members, the government, and the general public. ACFP’s Mission Statement should be used in many different communication formats. For example, the statement should be printed on the back of all business cards used by the officers and staff; should be incorporated into the header on the newsletter; and should be printed, framed, and hung on the walls of the ACFP’s office.

Recommendation Two: ACFP’s Board needs to develop a comprehensive *strategic plan*. This plan should identify ACFP’s strengths, weakness, opportunities and threats to the future of the organization. The plan should be created by directors and used to produce annual programs of work that outline specific activities, responsibilities, resources, and deadlines.

Recommendation Three: A major deficiency, which may limit ACFP’s effectiveness, is the lack of formalized *documentation* (written policies, procedures, and job descriptions for officers, Directors, and staff, membership orientation material, services and program brochures, issue briefs, action bulletins). These are normal management tools that are used by associations throughout the world. Developing these documents will enhance ACFP’s operational capabilities and will prevent the wasting of time and energy “reinventing the wheel” each time decisions must be made or a policy question arises.

Recommendation Four: ACFP needs to be “results-oriented” rather than “*activities-oriented*.” All communication with members should emphasize the results being

produced by the efforts of ACFP, instead of simply listing the activities in which the staff and the directors have been involved. In today's global economy, association members are interested in outcomes, not processes.

Recommendation Five: ACFP should be a ‘*customer-friendly*’ organization. The organization should prepare now by adopting an attitude of continuously “selling members on the need for the institution”.

Recommendation Six: ACFP needs to publish a formalized *annual report* on all the results produced by the actions of the organization. The report should be used for public and membership relations purposes.

Recommendation Seven: The ACFP needs to adopt a *formal public policy advocacy* program. As part of its program of work and strategic plan, the program should outline the organization's recommendations for changes in specific laws that will improve the business investment climate of Jordan.

Recommendation Eight: Human and financial resources should be allocated to develop professional *public relation* efforts to spread the message of the organization.

Recommendation Nine: A strategy for the improvement of *relationships with other Jordanian organizations* must be adopted. Competition between groups for manpower and financial resources is creeping into the Jordanian association system. Duplication of programs and services are inevitable. Jordan cannot afford to compete internally with itself or to duplicate efforts. Strategic alliances should be formed with like-organizations and, instead of competing internally, Jordanian organizations should complement each other's external efforts.

Recommendation Ten: After developing ACFP's strategic plan, an in-depth analysis of the organization's *personnel needs* should be made. Further a realistic view of the financial needs of the ACFP should be developed which incorporates all of the Programs of Work.

During the brain storming sessions to be conducted this week, the following items related to the planning process might be discussed. **Your valued input is important** to the success of this exercise and to the development of a meaningful long range Strategic Plan for the ACFP.

ACFP Checklist.....

Today's Realities - Tomorrow's Opportunities

Mission Statement	Organizational Objectives
Program of Work	Priorities
Activities	Pitfalls
Core Competencies	Organizational Structure
Staffing	Member Services
Income Generation	Expense Control
Member Recruitment - Retention	Public Policy Analysis
Public Policy Advocacy	Staff Development
Board Development - Role/Responsibility	Public Relations
Financial Controls	Issues Management

Strategic Planning REPORT

Business Association Strategic Planning AMIR Program BAI Component

DATE CONVENED: Wednesday 1 November 2000

DATE COMPLETED: Thursday 2 November 2000

ORGANIZATION: Association of Certified Financial Professionals

VENUE: Radisson SAS Hotel in Amman, Jordan

PARTICIPANTS: H.E. Dr. Mohammad Said Nabulsi, Chairman, Jawad Kharouf, Vice Chairman, Bashar Amad, Secretary, Shawki Al-Sadr, Treasurer, Amjad Al-Resheq, Board Member, Marwan Al-Nahlah, Board Member, Amer Mouasher, Board Member

Dr. Zaki Ayoubi, Board Member and
AMIR Program BAI Component Leader
Robert L. Ash, AMIR Program Association Planning Specialist
And Facilitator
Dr. Karina Narsisian, AMIR Program Training Specialist
Bonnie Goldsborough, AMIR Program Fulbright Fellow

The participants were lead through the Strategic Planning Session, which involved brainstorming and discussion periods over an interval of two days. The last quarter of the Session was designed as a brief wrap-up session to allow the participants an opportunity to voice any last minute changes or additions to the Mission, Objectives, Strategy and Programs of Work. There was active involvement by all participants throughout the sessions including the team building exercises.

Following herein is a transcription of some of the flip chart and white board notes recorded during these sessions.

STRATEGIC PLANNING PROCESS

Diagnostic

SP Process

MS

Objectives

Strategy Results

Program of Work

ACFP – THE ORGANIZATION

Current Staffing: Part-time secretary and clerk & Board Members

Office Space – Use existing space and look for space in the new building.

Signage – need to put signage on the floor where office is located

Image = logo (need to determine logo)

PR Brochure

MEMBERSHIP

100 Versus 1000

Modify By Laws to expand definition of membership

Strategy = Cover Cost

Expand

Certified versus associate membership

Similar Fees

Board approval of all applicants

WHERE IS THE ACFP TODAY?

Define “Financial Professional” (perception of Financial Professional = Broker)

Legal Existence of ACFP is mandatory

Members equals 117, 50% of whom have paid

Voluntary membership (1/2 of Financial Managers are not members)

ACFP has staff and office space

ACFP has bank account with JD 15,000

Currently trying to advocate issues and represent member interests

STRUCTURAL RESPONSIBILITIES

Entity		Responsible For:
Board of Directors	—————▶	Policy
Staff	—————▶	Administration
Members (Committee)	—————▶	Activities

Each committee should have six members and include one board member

One committee should be established for each program

QUICK EXAMINATION OF FINANCIALS

Current: 25JD for Membership with 117 Members

Revenue

Membership Dues (JD 25 X 117)	<u>2925</u> JD 2925
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Expenses

Salary Expense (JD 340 X 12)	4080
Employee Insurance (JD 50 X 12)	<u>600</u>
Total Expenses	JD 4680

Surplus (Deficit)	JD (1755)
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PRELIMINARY PLAN OF ACTION

Create draft Strategic Plan (AMIR submits SP to the Board of the ACFP)

ACFP Board Edits/Approves Strategic Plan

AMIR makes final Strategic Plan

Board adopts final Strategic Plan by January 12, 2001

Board works to change internal by laws and expand membership

REVIEW OF SITUATION

The members must be individuals who are currently working in the financial industry

All previous brokers were grandfathered as Certified Financial Professionals, even though they never took the certification examination

Currently, an unemployed financial professional can retain his financial license for three months before its revocation and is eligible to stay certified for three years before losing his certification.

There must be a distinction between standards and licensing

There are currently 7 CFAs in Jordan, only two of whom are members of the ACFP

Durability

Employee Rights?

Four different kinds of financial professional in Jordan:

1. Broker
 2. Investment Manager
 3. Consultants
 4. Trustees
-

PROJECTED FINANCIALS

Association of Certified Financial Professionals – Financial Projections			
Revenues	Year 1	Year 2	Year 3
JD25*Number of Members*	2925	5000	8750
Expenses	Year 1	Year 2	Year 3
Wages	4680	4680	4680
Telephone	600	600	600
Postage	120	120	120
Office Supplies	1000	1000	1000
Legal and Accounting	500	500	500
Annual Report	500	500	500
Public Relations	2000	2000	2000
Total Expenses	9400	9400	9400
Surplus (Deficit)	(6475)	(4400)	(650)
*Projected Membership	117	200	350

Additional Amount Needed to Expand Services

Year 1	JD 6,000 – JD 12,000
Year 2	JD 4,000 – JD 8,000
Year 3	JD 2,000 – JD 4,000

Average Needed Over Three Years: JD 12,000 – JD 24,000

Grant Request Recommendation	
Year 1	JD 8000
Year 2	JD 6000
Year 3	JD 4000
Total Request	JD 18000

COURSE PROGRAMS

Research and Development of New Course Schedule		
Year	Development of Courses	Courses Offered
1	Four New Courses	Four
2	Two New Courses	Six
3	Two New Courses	Eight

PLAN DEVELOPMENT

MISSION

MISSION STATEMENT

The Association of Certified Financial Professionals is a voluntary nonprofit organization representing its members and promoting superior levels of competence, education, ethics and professionalism in the financial services industry in Jordan.

OBJECTIVES

The Objectives of the Association of Certified Financial Professionals:

Promote the academic and professional level of financial professionals in Jordan.

Cooperate with the Jordan Securities Commission, Amman Stock Exchange, and the Securities Depository Center, other business associations inside and outside of Jordan.

Boost cooperation among members, coordinate activities and propagate awareness of the financial sector in Jordan.

To promote ethical best business practices

Interactive Summary

Criteria 1: Mission and Objectives

The Members of the Board of Directors formulated its mission statement during the Strategic Planning session in November 2000. Objectives were taken both from the pre-existing By-Laws of the ACFP and from additional objectives identified at the Strategic Planning session.

Criteria 2: Governing Body, Officers and Directors

The association currently has the Governing Body of the Board of Directors. The ACFP Board of Directors should create an executive committee and other committees for the execution of its programs of work and objectives.

Criteria 3: Organizational Structure and Documents

An organization chart should be drafted of the Board of Directors, Committee Members, and Association Staff. The ACFP will have seven committees. A board policy manual and a staff procedures manual need to be formulated. A professional code of ethics should be formulated and implemented.

Criteria 4: Programs, Services and Activities

A program of work has been prepared but needs to be more comprehensive to cover a period of three years. The ACFP should draw up a list of services and benefits offered to members. Since the association is newly established it has not yet prepared an annual report.

Criteria 5: Association Staff

Staff job descriptions should be defined. Existing staff should be trained in computer, English and management skills. A job application form, a personnel procedures manual, a performance evaluation form as well as an employee time sheet need to be developed for the Association's administrative staff.

Criteria 6: Financial Planning and Reporting

The ACFP has a preliminary budget. It needs to draw up an annual budget and create monthly financial reports. It also needs to look into and study a method for increasing membership dues to cover on-going administrative expenses. Non-dues income is generated through training activities.

Criteria 7: Membership Development and Retention

The ACFP has a list of existing members. It needs to create an application form to recruit additional members and identify the potential members it needs to contact.

Criteria 8: Communications

ACFP will begin publishing a quarterly insert in the Amman Stock Exchange newsletter to promote its projects and member activities. It needs to identify two spokespersons who will speak on behalf the association to the press and during public functions.

Criteria 9: Public Policy Advocacy

The association has already met with members of the JSC, ASE, and SDC to express members' viewpoints on changes in the financial industry in Jordan. A more structured approach is also recommended, which should include a Database of Concerns, summarizing the results of the Needs Assessment survey that will be distributed to all members.

Criteria 10: Information Management

The ACFP has one computer, typewriter, and a phone line.

DISCUSSION OF FINER POINTS**CRITERIA ONE - Mission and Objectives**

The association formulated a clear and concise mission statement during the Strategic Planning Session, November 1-2, 2000. It was agreed that the mission statement should be communicated to its members and other stakeholders. Existing objectives from the association's Articles of Incorporation were retained. While, the association has prepared by-laws since inception, the scope of membership will need to be expanded to fully achieve all objectives. This will involve a change of the existing by-laws.

CRITERIA TWO - Governing Body, Officers and Directors

The ACFP has a 7-member Board of Directors. Officers include the Chairman, Vice Chairman, Treasurer and Secretary.

CRITERIA THREE - Organizational Structure and Documents

The association does not have an organization chart. It was agreed upon that the ACFP should establish seven committees, a chairperson (Board member) for each committee, with written descriptions for all committees. The ACFP will not develop task forces or other groups at this time. A staff policy procedures manual needs to be formulated.

CRITERIA FOUR - Programs and Services

The ACFP has prepared an outline for an annual program of work but the PoW needs to be more detailed and comprehensive to cover a period of three years. The association has drawn up a list of services and benefits offered to members and should develop a clear plan to achieve its mission and objectives. Since the association is newly established, it did not prepare an annual report.

CRITERIA FIVE - Association Staff

The association needs to train its existing secretarial staff in word-processing, spreadsheet, English, and management skills. The ACFP should define job descriptions for its staff, develop a personnel and procedures manual, a performance evaluation form, a job application form and an employee time sheet.

CRITERIA SIX - Financial Planning and Reporting

The association's current reserves include carry-over from its predecessor, the Association of Brokerages. An estimated preliminary budget was presented at the Strategic Planning session. The association however needs to draw up a detailed annual budget. As the membership fee structure has been determined in the association's articles of association, the articles will need to be changed in order to alter the fee structure of the association. Additional non-dues income will be generated through ACFP training seminars and workshops and other relevant activities.

CRITERIA SEVEN - Membership Development and Retention

The association needs to develop an application form to recruit new members. No material of this nature currently exists.

CRITERIA EIGHT - Communications

The association will begin to regularly publish a bulletin on its activities that will initially be contained within the newsletter of the Amman Stock Exchange. No communications strategy is currently in place to state the association's position on relevant issues. It should assign two officers as spokespersons.

CRITERIA NINE - Public Policy Advocacy

The ACFP needs to establish a public policy advocacy strategy. The association will need to develop this strategy only after it received feedback from the Needs Assessment Survey, which will be distributed to all members. The association does not have research reports or write policy papers at this time.

CRITERIA TEN - Information Management

The association does not have a photograph of its facility. The ACFP does not have a state-of-the-art computer capability.

THE STRATEGY - A THREE YEAR PLAN

The Board of Directors of the ACFP have undertaken the first steps in the long range planning process of drawing up a comprehensive 3 Year Strategic Plan by formulating a Mission Statement and organization Objectives which are presented in the two previous pages of this document.

Now that the “Why” and “What” questions have been resolved, we are properly positioned to articulate the “How” segment of the planning process. The Board of Directors working through and with Mr. Ash and Dr. Ayoubi, have developed the following strategies:

The organization needs to make amendments to its by-laws to include all financial professionals in Jordan, not just those who are certified by the Jordan Securities Commission and begin targeting those professionals for membership

The organization needs to more fully develop its human resource including professional staff, the Board of Directors and Association Members

The organization should begin providing training programs to the public on issues of concern to the financial professional in Jordan.

When further developed these strategies are enhanced as follows:

Promote the academic and professional level of financial professionals in Jordan

- 1- Identify current level of membership by creating a Skills Database.
- 2- Distribute a Needs Assessment Survey to all current members of ACFP.
- 3- Develop a 3-year curriculum for training, based on findings from Needs Assessment.

Strengthen - Expand Core Competencies

Affect public policy to improve the financial environment

- 1- Identify and quantify concerns of ACFP membership
- 2- Analyze issues, assess the impact and develop positions relative to existing policies.
- 3- Advocate appropriate change.

Develop Its Human Resource

To facilitate development of financial professionals through provision of relevant training and education.

- 1- Assess training requirements for financial professionals in Jordan.
- 2- Identify training programs for financial professionals.
- 3- Facilitate the delivery of training.
- 4- Educate external stakeholders on the value and impact of educated financial professionals in Jordan.

Cooperate with JSC, ASE, SDC, and business organizations within and outside of Jordan.

To develop a forum for networking among members and the global community.

- 1- Establish alliances with national, regional and international organizations.
- 2- Establish an intra ACFP network for exchanging information and experiences.
- 3- Disseminate pertinent information to members.

To promote ethical best business practices

- 1- Establish a code of ethics for financial professionals.
- 2- Educate members and the general public on values of business ethics.

The following sets of Programs of Work have been developed to define what Actions must be taken to accomplish the Strategies outlined above. Each set relates back to a particular strategy and covers three years of activities. Following the PoWs is a 3-Year Implementation Schedule, an Objectives and Checkpoints table and the Budget Requirement (as yet undeveloped) to fulfill the three-year plan.

The ACFP Board needs to approve the Strategic Plan and Budget.

The new committees suggested within the various PoWs should meet at least monthly and report (written reports and oral presentations) to the Board quarterly. Committee Members should become actively involved in the development and implementation of the activities outlined in their Committee descriptions and PoWs. This tactic will temporarily shift some of the burden from the professional staff to the Membership until adequate numbers of qualified staff can be recruited or trained. At that point some of the Committee work can be redirected toward the professional staff.

The Members should approve the Strategic Plan as presented and explained to them by the Board.

The Board and ACFP Staff should undertake to implement the Strategic Plan and its associated Programs of Work. An annual review and revision should also be accomplished to determine the cost/benefit ratios and measurable member impact.

Association of Certified Financial Professionals

Program of Work - Strengthen Core Competencies**Member Services Committee****Year One (2001 - 2002)****Committee Goal:**

Identify and cause to be provided those specific services ACFP Members consider to be of the most importance or highest value to their businesses and to increase ACFP membership in programmed increments to a point of financial and organizational self-reliance.

Objective:

Improved Member Service Delivery

To retain current members by providing quality services

To attract 83 new members

Strategies/Tasks/Activities:

Perform and analyze Member Services “Needs Assessment” Survey

Continuously analyze membership satisfaction

Strengthen existing and implement new Member Services as identified in the survey

Actively promote the new ACFP Services offerings

Establish an ACFP Annual Program of Training for Members

Analyze current Member Retention/Recruitment program

Identify Financial Professionals Target for Recruitment

Train Board, Staff and volunteers in professional Membership Retention/Recruitment techniques

Develop and distribute a New Member Orientation Kit

Conduct Annual Membership Retention/Recruitment program

Association of Certified Financial Professionals

Program of Work - Strengthen Core Competencies

Member Services Committee

Year One (2001 - 2002)

Continued

Measurement Criteria:

Needs Assessment Completed

Membership Satisfaction from Services Provided

Existing Services Strengthen - New Services Offered

Annual Training Program In Place

Net "Dues Paying" Membership = 83

Individual Responsible:

Committee Chairperson

Time Line:

Needs Assessment	March 2001
Improved Services	March 2001
Training Program	April 2001
Retention	Continuous
Recruitment	Continuous

Resources Needed:

Internal:

External:

AMIR Funding to conduct Services Needs Assessment
 AMIR Funding to promote Training Program
 AMIR Technical Assistance to Strengthen Core Competencies
 AMIR Membership Recruitment Budget

Association of Certified Financial Professionals

Program of Work - Strengthen Core Competencies**Member Services Committee****Year Two (2002 -2003)****Committee Goal:**

Identify and cause to be provided those specific services ACFP Members consider to be of the most importance or highest value to their businesses and to increase ACFP membership in programmed increments to a point of financial and organizational self-reliance.

Objective:

Improved Member Service Delivery

To retain current members by providing quality services

To attract 100 new members

Strategies/Tasks/Activities:

Strengthen existing Member Services

Continuously analyze membership satisfaction

Actively promote ACFP Services offerings

Continue an ACFP Annual Program of Training for Members

Analyze current Member Retention/Recruitment program

Identify Financial Professionals Target for Recruitment

Train Board, Staff and volunteers in professional Membership Retention/Recruitment techniques

Develop and distribute a New Member Orientation Kit

Conduct Annual Membership Retention/Recruitment program

Association of Certified Financial Professionals

Program of Work - Strengthen Core Competencies

Member Services Committee

Year Two (2002 -2003)

Continued

Measurement Criteria:

Membership Satisfaction from Services Provided

Existing Services Strengthen - New Services Offered

Annual Training Program In Place

Net "Dues Paying" Membership = 100

Individual Responsible:

Committee Chairperson

Time Line:

Improved Services	Continuous
Training Program	Continuous
Retention	Continuous
Recruitment	Continuous

Resources Needed:

Internal:

None, additional

External:

Other Funding to promote Training Program
Other Technical Assistance to Strengthen Core Competencies

Association of Certified Financial Professionals

Program of Work - Strengthen Core Competencies

Member Services Committee

Year Three (2003 -2004)

Committee Goal:

Identify and cause to be provided those specific services ACFP Members consider to be of the most importance or highest value to their businesses and to increase ACFP membership in programmed increments to a point of financial and organizational self-reliance.

Objective:

Improved Member Service Delivery

To retain current members by providing quality services

To attract 200 new members

Strategies/Tasks/Activities:

Strengthen existing and implement new Member Services as identified in the survey

Continuously analyze membership satisfaction

Actively promote ACFP Services offerings

Continue an ACFP Annual Program of Training for Members

Analyze current Member Retention/Recruitment program

Identify Financial Professionals Target for Recruitment

Train Board, Staff and volunteers in professional Membership Retention/Recruitment techniques

Develop and distribute a New Member Orientation Kit

Conduct Annual Membership Retention/Recruitment program

Association of Certified Financial Professionals

Program of Work - Strengthen Core Competencies

Member Services Committee

Year Three (2003-2004)

Continued

Measurement Criteria:

Membership Satisfaction from Services Provided

Existing Services Strengthen - New Services Offered

Annual Training Program In Place

Net "Dues Paying" Membership = 200

Individual Responsible:

Committee Chairperson

Time Line:

Improved Services	Continuous
Retention	Continuous
Recruitment	Continuous

Resources Needed:

Internal:

None, additional

External:

Other Funding to promote Training Program
Other Technical Assistance to Strengthen Core Competencies

Association of Certified Financial Professionals

Program of Work - Human Resources Development

Human Resource Committee

Year One (2001 - 2002)

Committee Goal:

To ensure ACFP Staff and Management are afforded every opportunity to develop into high caliber professional association employees and ACFP Members can effectively contribute to the performance of the association

Objective:

A professionally staffed “Customer Service” Oriented business organization

Strategies/Tasks/Activities:

Write, adopt and implement a Policy and Procedures Manual, which includes an Employee Handbook, Organization Chart (Members, Board, Committees, Staff, External Stakeholders) and Job Descriptions

Formulate an Employee Evaluation System and conduct Annual Personnel Appraisals with Development Plans

Evaluate Staff Training and Development needs and implement scheduled individual and group training programs

Design and implement an ACFP Job Application

Write and Implement a Board Policy Manual and Code of Ethics

Establish new ACFP Committees in support of the Board including: Executive, Membership, Human Resource Public Relations / Communications, Issues Management, Etc. Involve all qualified ACFP Members

Assess the human resource requirement to implement this strategic plan and effectively provide the services contained therein. Prepare requests for qualified international volunteers and submit to the appropriate volunteer agencies.

Association of Certified Financial Professionals

Program of Work - Human Resources Development

Human Resource Committee

Year One (2001 - 2002)

continued

Measurement Criteria:	Policy and Procedures Manuals in use
	Employment Evaluation System in use and all Employees appraised annually
	Staff Training Program in effect
	ACFP Committees Established
Individual Responsible:	Committee Chairperson
Time Line:	Policy and Procedures Manuals May 1, 2001
	Employee Evaluation System June 1, 2001
	Staff Training Program July 1, 2001
	New Committees Functioning April 1, 2001
Resources Needed:	
Internal:	Increased Participation by ACFP Members
External:	AMIR Technical Training & Assistance for ACFP Board and Staff, Volunteers and Interns
	AMIR Human Resource Development Budget

Association of Certified Financial Professionals

Program of Work - Human Resources Development

Year Two (2002-2003)

Human Resource Committee

Committee Goal:	To ensure ACFP Staff and Management are afforded every opportunity to develop into high caliber professional association employees and ACFP Members can effectively contribute to the performance of the association
Objective:	A professionally staffed “Customer Service” Oriented business organization
Strategies/Tasks/Activities:	<p>Implement Policy and Procedures Manual, which includes an Employee Handbook, Organization Chart (Members, Board, Committees, Staff, External Stakeholders) and Job Descriptions</p> <p>Conduct Annual Personnel Appraisals with Development Plans</p> <p>Evaluate Staff Training and Development needs and implement scheduled individual and group training programs</p> <p>Utilize ACFP Job Application, if necessary</p> <p>Utilize Board Policy Manual and Code of Ethics</p> <p>Support ACFP Committee activities. Involve all qualified ACFP Members</p> <p>Assess the human resource requirement to implement this strategic plan and effectively provide the services contained therein. Prepare requests for qualified international volunteers and submit to the appropriate volunteer agencies.</p>

Association of Certified Financial Professionals

Program of Work - Human Resources Development

Year Two (2002 -2003)

Human Resource Committee

continued

Measurement Criteria:	Policy and Procedures Manuals in use	
	Employment Evaluation System in use and all Employees appraised annually	
	Staff Training Program in effect	
	ACFP Committees Functioning	
Individual Responsible:	Committee Chairperson	
Time Line:	Policy and Procedures Manuals	Continuous
	Employee Evaluation System	Continuous
	Staff Training Program	Continuous
	Augmented Staff in Place	Continuous
	New Committees Functioning	Continuous
Resources Needed:		
Internal:	Increased Human Resource Development Budget	
External:	Increased Participation by ACFP Members Other Technical Training & Assistance for ACFP Board and Staff, Volunteers and Interns	

Association of Certified Financial Professionals

Program of Work - Human Resources Development

Year Three (2003 -2004)

Human Resource Committee

Committee Goal:	To ensure ACFP Staff and Management are afforded every opportunity to develop into high caliber professional association employees and ACFP Members can effectively contribute to the performance of the association
Objective:	A professionally staffed “Customer Service” Oriented business organization
Strategies/Tasks/Activities:	<p>Implement Policy and Procedures Manual, which includes an Employee Handbook, Organization Chart (Members, Board, Committees, Staff, External Stakeholders) and Job Descriptions</p> <p>Conduct Annual Personnel Appraisals with Development Plans</p> <p>Evaluate Staff Training and Development needs and Implement scheduled individual and group Training Programs</p> <p>Utilize ACFP Job Application if necessary</p> <p>Utilize Board Policy Manual and Code of Ethics</p> <p>Support ACFP Committee activities. Involve all qualified ACFP Members</p> <p>Assess the human resource requirement to implement this strategic plan and effectively provide the services contained therein. Prepare requests for qualified international volunteers and submit to the appropriate volunteer agencies.</p>

Association of Certified Financial Professionals

Program of Work - Human Resources Development

Year Three (2003 -2004)

Human Resource Committee

continued

Measurement Criteria:	Policy and Procedures Manuals in use	
	Employment Evaluation System in use and all Employees appraised annually	
	Staff Training Program in effect	
	ACFP Committees Restructured	
Individual Responsible:	Committee Chairperson	
Time Line:	Policy and Procedures Manuals	Continuous
	Employee Evaluation System	Continuous
	Staff Training Program	Continuous
	New Committees Functioning	Continuous
Resources Needed:		
Internal:	Increased Human Resource Development Budget	
External:	Increased Participation by ACFP Members	
	Other Technical Training & Assistance for ACFP Board and Staff, Volunteers and Interns	

Association of Certified Financial Professionals

Program of Work - Public Relations

Year One (2001 -2002)

PR/Communication Committee

Committee Goal: Improved recognition by Members, prospective members and other External Stakeholders of the ACFP as a legitimate representative of financial professionals in Jordan.

Objective: To enhance the publications and support literature promoting ACFP programs and services.

To strengthen the Lines of Communications between the ACFP and its Members, prospective members and other External Stakeholders.

Strategies/Tasks/Activities: Design ACFP publications and support literature as needed

Print and distribute upgraded ACFP publications and support literature

Organize professional PR training for selected ACFP staff

Design, implement and nurture a Member-to-Member Network

Sponsor a “Financial Professional of the Year” awards program

Develop and implement a schedule of regular briefings and updates for ACFP Members and External Stakeholders including the media and Government officials.

Measurement Criteria: Creation of new ACFP publications and their projection of a common theme reflecting the current Mission, Objectives, Services and Benefits of the organization.

“Financial Professional of the Year” recognized by ACFP

ACFP Member-to-Member Network functioning

Individual Responsible: Committee Chairman

Association of Certified Financial Professionals

Program of Work - Public Relations

Year One (2001 - 2002)

PR/Communication Committee

continued

Time Line:	Training/Technical Assistance	May 2001
	Implementation/Delivery	February 2001

Resources Needed:

Internal:

External:

AMIR Increased budget for new publications
AMIR Technical Assistance (Public Relations Specialist)
AMIR Technical Training for ACFP PR Staff (Public Relations Specialist)
AMIR increased budget for “Financial Professional of the Year” program

Association of Certified Financial Professionals

Program of Work - Public Relations

Year Two (2002 - 2003)

PR/Communications Committee

Committee Goal:	Improved recognition by Members, prospective members and other External Stakeholders of the ACFP as a legitimate representative on private sector issues, particularly those relating to business development.	
Objective:	To strengthen the Lines of Communications between the ACFP and its Members, prospective members and other External Stakeholders.	
	To enhance Board and staff PR skills through on-site visits to similar private sector groups in other countries.	
Strategies/Tasks/Activities:	Conduct regular briefings and updates for ACFP Members and External Stakeholders including the media and Government officials.	
	Continue enhanced PR program.	
	Nurture Member-to-Member Network	
	Sponsor a "Financial Professional of the Year" awards program	
Measurement Criteria:	ACFP conducts regular briefings for Members and External Stakeholders "Financial Professional of the Year" recognized by ACFP ACFP Member-to-Member Network functioning	
Individual Responsible:	Committee Chairman	
Time Line:	PR Interventions	Continuous
Resources Needed:		
Internal:	Increased budget for briefings	
External:	Other Increased budget for briefings Other Technical Assistance (international organizations)	

Program of Work - Public Relations Year Three (2003 - 2004)

Committee Goal:	Improved recognition by Members, prospective members and other External Stakeholders of the ACFP as a legitimate representative on private sector issues, particularly those relating to regional and international trade.
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Objective: To strengthen the Lines of Communications between the ACFP and its Members, prospective members and other External Stakeholders.

To hone staff PR skills through continuing education.

Strategies/Tasks/Activities: Conduct regular briefings and updates for ACFP Members and External Stakeholders including the media and Government officials.

Nurture Member-to-Member Network

Sponsor a “Financial Professional of the Year” awards program

Maintain enhanced PR program.

Measurement Criteria:	<p>ACFP conducts regular briefings for Members and External Stakeholders</p> <p>“Financial Professional of the Year” recognized by ACFP</p> <p>ACFP Member-to-Member Network functioning</p> <p>Local retraining accomplished for PR staff</p>
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Individual Responsible: Committee Chairman

Time Line: PR Interventions Continuous

Resources Needed:

Internal: Increased budget for PR training
External:

Association of Certified Financial Professionals

Program of Work - Public Policy Advocacy

Year One (2001- 2002)

Issues Management Committee

Committee Goal: Recognition by Members, prospective members and other External Stakeholders of the ACFP as a legitimate representative on financial sector issues.

Objective: To more fully develop its Financial Sector Issues research capability

To represent to External Stakeholders, ACFP positions on relevant private sector issues considered important by its membership

To form pro-active coalitions with other private sector associations for constructive dialogue with Government

Strategies/Tasks/Activities: Utilizing the expertise of the Board Members and the services of a Policy Advocacy Specialist develop an in-house Issues Management program including Analysis and Advocacy elements.

Use feedback from the Needs Assessment Survey to determine public policy issues of most concern to ACFP members

Perform in-house research or retain the services of an independent researcher

Develop a solid positive position on the issue and prepare the appropriate “paper” for circulation to Financial Sector institutions and/or associations for comment. Follow-up.

Train several staff, Board Members and Member volunteers as Policy Advocates (ACFP Issues spokespersons)

Develop consensus approval from private sector associations for the Position Paper circulated by the ACFP.

Association of Certified Financial Professionals

Program of Work - Public Policy Advocacy

Year One (2001-2002)

Issues Management Committee

Continued

Strategies/Tasks/Activities: Follow-up and report on advocacy progress to the Membership

Participate in and contribute to the AMIR Program sponsored Public Policy Awareness Seminars

Measurement Criteria: Policy Awareness Seminar Participation

Individual Responsible: Committee Chairman

Time Line:	Technical Assistance	TBD
	Research/Development	TBD
	Advocacy Training	TBD
	Policy Awareness Seminars	TBD

Resources Needed:

Internal:

External: AMIR budget for Policy Analysis/Advocacy
AMIR Technical Assistance (Policy Advocacy Specialist)
Issues Researcher(s) (Local or International Expert(s))

Association of Certified Financial Professionals

Program of Work - Public Policy Advocacy

Year Two (2002 - 2003)

Issues Management Committee

Committee Goal: Recognition by Members, prospective members and Other External Stakeholders of the ACFP as a legitimate representative on financial sector issues

Objective:

- To maintain a Financial Sector Issues research capability
- To represent to External Stakeholders, ACFP positions on relevant financial sector issues considered important by its Membership
- To form pro-active coalitions with other financial sector institutions and associations for constructive dialogue with Government

Strategies/Tasks/Activities:

- Follow-up and report on advocacy progress to the Membership
- Participate in and contribute to Public Policy Awareness Seminars
- Participate in various Public-Private policy forums convened

Association of Certified Financial Professionals

Program of Work - Public Policy Advocacy

Year Two (2002-2003)

Issues Management Committee

Continued

Measurement Criteria: Policy Awareness Seminar Participation

Individual Responsible: Committee Chairman

Time Line: Research/Development - TBD
Policy Awareness Seminars TBD

Resources Needed:

Internal: Increased budget for Policy Analysis/Advocacy

External: Other Increased budget for Policy Analysis/Advocacy

Association of Certified Financial Professionals

Program of Work - Public Policy Advocacy

Year Three (2003 - 2004)

Issues Management Committee

Committee Goal: Recognition by Members, prospective members and Other External Stakeholders of the ACFP as a legitimate representative on financial sector issues.

Objective: To maintain a Financial Sector Issues research capability

To represent to External Stakeholders, ACFP positions on relevant private sector issues considered important by its Membership

To form pro-active coalitions with other financial sector institutions and associations for constructive dialogue with Government

Strategies/Tasks/Activities:

Follow-up and report progress on advocacy to the Membership

Participate in and contribute to sponsored Public Policy Awareness Seminars

Participate in various Public-Private forums convened

Association of Certified Financial Professionals

Program of Work - Public Policy Advocacy

Year Three (2003 - 2004)

Issues Management Committee

Continued

Measurement Criteria: Policy Awareness Seminar Participation

Individual Responsible: Committee Chairman

Time Line: Research/Development TBD
Policy Awareness Seminars TBD

Resources Needed:

Internal: Increased budget for Policy Analysis/Advocacy

External: Other Increased budget for Policy Analysis/Advocacy

Association of Certified Financial Professionals

Program of Work - Organizational Alliances

Year One (2001-2002)

Organizational Alliances Committee

Committee Goal: Develop strategic domestic, regional and international organizational alliances to enhance the ACFP's ability to promote Jordanian financial professionals in the global marketplace

Objective:

- To target alliances that meet the new Mission and Objectives of the ACFP
- To target alliances that produce measurable results for ACFP members
- To form pro-active coalitions with other private sector associations for constructive dialogue with Government

Strategies/Tasks/Activities: Identify and develop domestic, regional and international alliances with business organizations that share the Mission and Objectives of the ACFP

Measurement Criteria: One new domestic and one new international alliance

Individual Responsible: Committee Chairman

Time Line:	New Domestic Alliance	September 2001
	New International Alliance	January 2002
	Existing Domestic Alliances	Continuous
	Existing International Alliances	Continuous

Resources Needed:

Internal:	None
External:	None

Association of Certified Financial Professionals

Program of Work - Organizational Alliances

Year Two (2002 - 2003)

Organizational Alliances Committee

Committee Goal: Develop strategic domestic, regional and international organizational alliances to enhance the ACFP's ability to promote Jordanian financial professionals in the global marketplace

Objective:

- To target alliances that meet the new Mission and Objectives of the ACFP
- To target alliances that produce measurable results for ACFP members
- To form pro-active coalitions with other private sector Associations for constructive dialogue with Government

Strategies/Tasks/Activities: Identify and develop domestic, regional and international alliances with business organizations that share the Mission and Objectives of the ACFP

Measurement Criteria: One new domestic and one new international alliance

Individual Responsible: Committee Chairman

Time Line:	New Domestic Alliance	September 2002
	New International Alliance	January 2003
	Existing Domestic Alliances	Continuous
	Existing International Alliances	Continuous

Resources Needed:

Internal:	None
External:	None

Association of Certified Financial Professionals

Program of Work - Organizational Alliances

Year Three (2003 -2004)

Organizational Alliances Committee

Committee Goal: Develop strategic domestic, regional and international organizational alliances to enhance the ACFP's ability to promote Jordanian financial professionals in the global marketplace

Objective: To target alliances that meet the new Mission and Objectives of the ACFP

To target alliances that produce measurable results for ACFP members

To form pro-active coalitions with other private sector associations for constructive dialogue with Government

Strategies/Tasks/Activities: Identify and develop domestic, regional and international alliances with business organizations that share the Mission and Objectives of the ACFP

Measurement Criteria: One new domestic and one new international alliance

Individual Responsible: Committee Chairman

Time Line:	New Domestic Alliance	September 2003
	New International Alliance	January 2004
	Existing Domestic Alliances	Continuous
	Existing International Alliances	Continuous

Resources Needed:

Internal:	None
External:	None

Association of Certified Financial Professionals

Program of Work - Training and Education

Year One (2001-2002)

Education and Training Committee

Committee Goal:	To provide essential services to help ACFP members develop regional and international business opportunities.	
Objective:	Organize and Sponsor Relevant Financial Professional Training Courses.	
	Organize and Sponsor Relevant Business Seminars.	
	Participate in Financial Sector Workshops.	
Strategies/Tasks/Activities:	Conduct a survey of ACFP members to determine their needs and preferences for training courses and seminars	
	Design, sponsor and deliver relevant training courses and seminars	
	Publish an annual ACFP Training Schedule.	
	Identify and participate in relevant Financial Sector Workshops	
	Formulate and submit to local embassies and other international donor organizations specific proposals for financial and technical assistance related to the activities contained herein	
Measurement Criteria:	ACFP Member Training Needs Assessment accomplished ACFP Sponsored Training Courses being delivered ACFP Sponsored Seminars being conducted ACFP Participation in Financial Sector Workshops ACFP receives donor assistance	
Individual Responsible:	Committee Chairman	
Time Line:	Needs Assessment Completed	March 2001
	Training Schedule Published	May 2001
	Training Seminars Delivered	May 2001
Resources Needed:		
Internal:	Increased Participation by ACFP Members	
External:	AMIR Support	

Association of Certified Financial Professionals

Program of Work - Training and Education

Year Two (2002-2003)

Education and Training Committee

Committee Goal:	To provide essential services to help ACFP members develop regional and international business opportunities.	
Objective:	Organize and Sponsor Relevant Financial Professional Training Courses.	
	Organize and Sponsor Relevant Business Seminars.	
	Participate in Financial Sector Workshops.	
Strategies/Tasks/Activities:	Conduct a survey of ACFP members to determine their needs and preferences for training courses and seminars	
	Design, sponsor and deliver relevant training courses and seminars	
	Publish an annual ACFP Training Schedule.	
	Identify and participate in relevant Financial Sector Workshops	
	Formulate and submit to local embassies and other international donor organizations specific proposals for financial and technical assistance related to the activities contained herein	
Measurement Criteria:	ACFP Member Training Needs Assessment accomplished ACFP Sponsored Training Courses being delivered ACFP Sponsored Seminars being conducted ACFP Participation in Private Sector Workshops ACFP receives donor assistance	
Individual Responsible:	Committee Chairman	
Time Line:	Training Schedule Published	January 2002
	Training Seminars Delivered	Continuous
Resources Needed:		
Internal:	Increased Participation by ACFP Members	
External:	Other Donor Support	

Association of Certified Financial Professionals

Program of Work - Training and Education

Year Three (2003-2004)

Education and Training Committee

Committee Goal:	To provide essential services which help ACFP members develop regional and international business opportunities.	
Objective:	Organize and Sponsor Relevant Financial Professional Training Courses.	
	Organize and Sponsor Relevant Business Seminars.	
	Participate in Financial Sector Workshops.	
Strategies/Tasks/Activities:	Conduct a survey of ACFP members to determine their needs and preferences for training courses and seminars	
	Design, sponsor and deliver relevant training courses and seminars	
	Publish an annual ACFP Training Schedule.	
	Identify and participate in relevant Financial Sector Workshops	
	Formulate and submit to local embassies and other international donor organizations specific proposals for financial and technical assistance related to the activities contained herein	
Measurement Criteria:	ACFP Member Training Needs Assessment accomplished ACFP Sponsored Training Courses being delivered ACFP Sponsored Seminars being conducted ACFP Participation in Financial Sector Workshops ACFP receives donor assistance	
Individual Responsible:	Committee Chairman	
Time Line:	Training Schedule Published	January 2003
	Training Seminars Delivered	Continuous
Resources Needed:		
Internal:	Increased Participation by ACFP Members	
External:	Other Donor Support	

Association of Certified Financial Professionals

Program of Work - “Best” Ethical Business Practices

Year One (2001-2002)

Business Practices Committee (Ad Hoc)

Committee Goal:	To promote best ethical business practices.	
Objective:	To develop an “financial professional” code of ethical business practices.	
Strategies/Tasks/Activities:	Evaluate concerns of financial professionals regarding business practices in Jordan.	
	Research existing national, regional, and international code of ethics.	
	Promote “financial professional” code of ethical business practices within and outside ACFP.	
Measurement Criteria:	Approval of “financial professional” code of ethics by General Assembly.	
Individual Responsible:	Committee Chairman	
Time Line:	Evaluation period	September 2001
	Research existing codes	Continuous
	Presentation of Code	December 2001
	Promotion of Code	January - June 2002
Resources Needed:		
Internal:	Ad Hoc Committee development, Legal Counsel	
External:		

IMPLEMENTATION SCHEDULE

IMPLEMENTATION SCHEDULE**ACFP THREE YEAR STRATEGIC PLAN**

		2001												2002												2003													
COMMITTEEACTIVITY		D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	
BOARD	Develop Strat Plan Budget	***																																					
BOARD	Establish Committees	**																																					
BOARD	Approve Strategic Plan	*																																					
BOARD	Review Strategic Plan Progress											*												*								*							
BOARD	Develop New 3rd Rolling Yr. PoW												*												*											*			
CORE	Needs Assessment	****																																					
CORE	Improve Services	*****																																					
CORE	Training Program	*****																																					
CORE	Design and impl. REC/RET prg.	*****																																					
HUM RES	Develop Policy and Procedures Manual	*****																																					
HUM RES	Develop Employee Evaluation System	*****																																					
HUM RES	Develop Staff Training Program	*****																																					
HUM RES	New Committees Functioning	*****																																					
PR/COMM	Training/Technical Assistance	*****																																					
PR/COMM	Implementation/Delivery	*****																																					
ISS MANG	Technical Assistance - TBD																																						
ISS MANG	Research and Development -TBD																																						
ISS MANG	Advocacy Training - TBD																																						
ISS MANG	Policy Awareness Seminars - TBD																																						

IMPLEMENTATION SCHEDULE**ACFP THREE YEAR STRATEGIC PLAN**

		2001												2002												2003												
COMMITTEEACTIVITY		D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
ORG ALL	New Domestic Alliances											**												**												**		
ORG ALL	New International Alliances														**											**												
ORG ALL	Existing Domestic Alliances														*****											*****												
ORG ALL	Existing International Alliances														*****											*****												
EDU TRG	Needs Assessment Completed	**																																				
EDU TRG	Training Schedule Published						**								**											**												
EDU TRG	Training Seminars Delivered														*****											*****												
AD HOC	Evaluation Period										**																											
AD HOC	Research existing code						*****																															
AD HOC	Presentation of code												**																									
AD HOC	Promotion of code													*****																								

ACFP Strategic Plan

Program Objectives and Checkpoints

YEAR ONE 2001-2002

STRENGTHEN CORE COMPETENCIES

- Needs Assessment Completed
- Existing Services Strengthened - New Services Offered
- Annual Training Program In Place
- Membership satisfaction from services provided
- Improved services
- Recruitment retention program

HUMAN RESOURCES DEVELOPMENT

- Policy and Procedures Manuals in use
- Employment Evaluation System in use and all Employees appraised annually
- Staff Training Program in effect
- ACFP Committees Established

PUBLIC RELATIONS - COMMUNICATIONS

- Creation of ACFP publications and support literature to project a common theme reflecting the current Mission, Objectives, Services and Benefits of the organization.
- “Financial Professional of the Year” recognized by ACFP
- ACFP Member-to-Member Network functioning
- Develop and implement a schedule of regular briefings and updates for ACFP Members and External Stakeholders including the media and Government officials

PUBLIC POLICY ADVOCACY

- Policy Awareness Seminar Participation

ORGANIZATIONAL ALLIANCES

- One new domestic and one new international alliance

EDUCATION & TRAINING

- Training schedule published
- Training seminars delivered

BEST PRACTICES COMMITTEE (AD HOC)

- Approval of financial professional codes of ethics by General Assembly

83 new members recruited.

CHECKPOINT DATE: December 2001

ACFP Strategic Plan

Program Objectives and Checkpoints

YEAR TWO 2002 -2003

STRENGTHEN CORE COMPETENCIES

- Needs Assessment Completed
- Existing Services Strengthen - New Services Offered
- Annual Training Program In Place
- Membership satisfaction from services provided
- Improved services
- Recruitment retention program

HUMAN RESOURCES DEVELOPMENT

- Policy and Procedures Manuals in use
- Employment Evaluation System in use and all Employees appraised annually
- Staff Training Program in effect
- ACFP Committees Functioning

PUBLIC RELATIONS - COMMUNICATIONS

- All ACFP publications and support literature are updated and project a common theme reflecting the current Mission, Objectives, Services and Benefits of the organization.
- “Financial Professional of the Year” recognized by ACFP
- ACFP Member-to-Member Network functioning
- Maintain schedule of regular briefings and updates for ACFP Members and External Stakeholders including the media and Government officials

PUBLIC POLICY ADVOCACY

- Policy Awareness Seminar Participation

ORGANIZATIONAL ALLIANCES

- One new domestic and one new international alliance
- Existing alliances strengthened

EDUCATION & TRAINING

- Training schedule published
- Training seminars delivered

100 new members recruited.

CHECKPOINT DATE: December 2002

ACFP Strategic Plan Program Objectives and Checkpoints

YEAR THREE (2003 - 2004)

STRENGTHEN CORE COMPETENCIES

- Needs Assessment Completed
- Existing Services Strengthen - New Services Offered
- Annual Training Program In Place
- Membership satisfaction from services provided
- Improved services
- Recruitment retention program

HUMAN RESOURCES DEVELOPMENT

- Policy and Procedures Manuals in use
- Employment Evaluation System in use and all Employees appraised annually
- Staff Training Program in effect
- ACFP Committees Functioning

PUBLIC RELATIONS - COMMUNICATIONS

- All ACFP publications and support literature are updated and project a common theme reflecting the current Mission, Objectives, Services and Benefits of the organization.
- “Financial Professional of the Year” recognized by ACFP
- ACFP Member-to-Member Network functioning
- Maintain schedule of regular briefings and updates for ACFP Members and External Stakeholders including the media and Government officials

PUBLIC POLICY ADVOCACY

- Policy Awareness Seminar Participation

ORGANIZATIONAL ALLIANCES

- One new domestic and one new international alliance
- Existing alliances strengthened

EDUCATION & TRAINING

- Training schedule published
- Training seminars delivered

200 new members recruited.

CHECKPOINT DATE: December 2003